

## METHOD AND SYSTEM FOR COLLABORATING ADVISORS

### Abstract

5 The present invention provides a common collaboration tool to interact, communicate and serve a client in a coordinated manner in various areas of interest. The present invention enables a client to authorize selected advisors as well as other participants to view, discuss, modify and perform other operations in response to the client's request for services. A client may define the scope of authorization for advisors and/or other participants for security and confidentiality reasons. Advisors (and/or participants) may access information submitted (or authorized) by the client to collaborate as a cohesive team in sharing information, devising a plan, addressing client's concern, drafting (or modifying) a document and performing other services for the client. The present invention provides a mechanism to implement planning in an organized and efficient manner, by promoting consistent and accurate collaboration of resources and efforts.

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